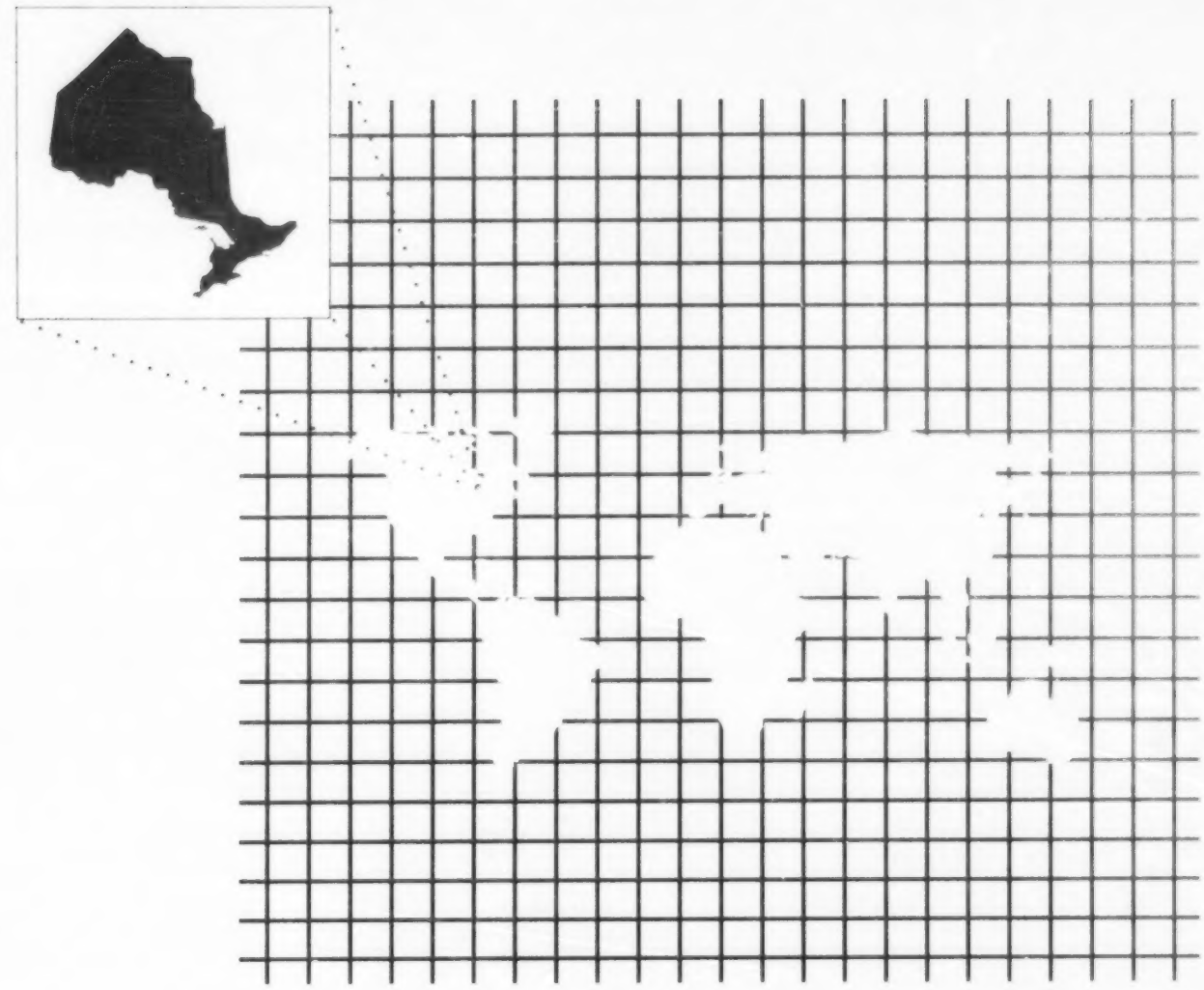

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Ontario's Overnight Pleasure Travel Market - 1999

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- HIGHLIGHTS -

- In 1999, 106 million person visits were made in Ontario by same day and overnight visitors from across Canada and around the world. Those who visited Ontario primarily for pleasure accounted for 42.6% of this total, or for 45.1 million person visits. Overnight pleasure visitors accounted for 40% of the total pleasure visitors, or for 18.0 million person visits.

- Three-quarters of Ontario's overnight pleasure visitors came from Ontario, Michigan and New York, with Ontario accounting for 86% of these three markets.

- Canadians, with the exception of those living in Winnipeg, had a higher incidence of overnight non-pleasure travel to Ontario than overnight pleasure travel, while for the Americans the opposite was true (Americans accounted for 19.6% of all overnight visitors to Ontario, but for 24.8% of the province's overnight pleasure visitors).

- On average, Ontario's overnight pleasure visitors spent 3.23 nights in the province in 1999. As expected, overseas overnight visitors stayed the longest (with UK and Germany having the longest lengths of stay among overseas countries), followed by Americans and Canadians.

- Overnight pleasure visitors from Canada as a whole, America and overseas stayed longer in Ontario than overnight visitors from within the province. Overnight overseas visitors who came to Canada in 1999 for the purpose of visiting their friends or relatives stayed in Ontario twice as long (12.4 nights) as overnight pleasure visitors from these countries.

- Close to two-thirds (62.2%) of Ontario's overnight pleasure visitors stayed in the province for two nights or less and 76.6% stayed for three nights or less. Only 4.2% of Ontario's overnight pleasure visitors stayed in the province for ten or more nights.

- Ontarians on an overnight pleasure trip in Ontario had the highest incidence (81.6%) of taking a short getaway trip (3 nights or less) in the province, followed by Americans (72.2%) and finally overseas visitors (41.7%). In general, the further away a visitor to Ontario came from, the longer he/she stayed in the province.

- Overnight pleasure visitors generated 58.2 million of person nights in Ontario, or 46.2% of the total nights generated in the province by all overnight visitors.

- Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall. The majority (52.0%) of Ontario's overnight pleasure visitors travelled in the province during the July-September period (3rd quarter). This observation held across most of Ontario's main markets, with the exception Japan (although the largest proportion of pleasure visitors from this region came to Ontario during the summer, this proportion did not constitute a majority)

- The majority of the overnight pleasure visitors who were visiting Ontario during the first calendar quarter stayed in commercial roofed accommodation, while the majority of those travelling in Ontario during the remainder of the year stayed in non-commercial accommodation and campgrounds. The first and fourth quarters also received the largest share of overnight pleasure visitors who stayed at the homes of friends or relatives, while the third quarter received the largest share of overnight pleasure visitors who stayed at a private cottage.

- Because a much higher proportion of the overnight pleasure visitors who visited Ontario during the first and fourth quarters used commercial roofed accommodation, the average spending per overnight pleasure visitor-per night was much higher during the first and fourth quarters than it was during the second and third quarters.

- Although most of the overnight pleasure visitors in Ontario travelled in groups of two or more persons (79.8%), a sizeable group travelled alone (20.2%). The incidence of travelling with no companions was the lowest among American and French overnight pleasure visitors (only 13.5% of the Americans and 10.5% of the French overnight pleasure visitors travelled alone in Ontario) and the highest among Canadians (45.6%).

- Eight out of every ten travel parties (80.3%) who were visiting Ontario while on an overnight pleasure trip travelled in groups comprised of adults only, and about two-in-ten (19.7%) travelled with children under the age of 15. Of those travelling in adult parties, 48.3% travelled alone, 44.1% travelled in groups comprised of two adults and 7.6% in groups comprised of three or more adults.

- Overnight pleasure visitors travelling in parties comprised of adults only generated 79.6% of the party nights spent in Ontario for the purpose of pleasure. Since this share is slightly lower than their corresponding share of party visits, this implies that travelling parties with children stayed longer in Ontario than travelling parties with adults only. This was especially true for overnight pleasure visitors from Ontario, other Canadian provinces, the U.S., Germany and Japan. A consequence of the longer length of stay of parties with children was the fact that although these visitors accounted for 19.7% of Ontario's overnight pleasure parties, they accounted for 20.9% of the total expenditures incurred by overnight pleasure visitors, rendering them a higher yield market segment than those travelling in adults-only parties.

- Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of utilization of roofed commercial accommodation (43.3% vs. 34.9%) and consequently a lower usage of non-commercial accommodation (39.6% vs. 56.6%). They also had a much higher incidence of utilization of camping/trailer parks (16.5% vs. 8.3%).

- Almost a third (29.9%) of the Canadian overnight pleasure visitors used roofed commercial accommodation, 19.9% used campgrounds and 49.1% used non-commercial accommodation, such as the homes of friends/relatives or private cottages. On the other hand, 74.9% of the overnight pleasure visitors from the U.S. used commercial roofed accommodation, 9.0.% used campgrounds and only 14.7% used homes of friends or relatives, or private cottages. Overnight pleasure visitors from overseas countries had the highest incidence of utilization of commercial roofed accommodation (77.5%) and the lowest incidence of utilization of campgrounds (4.3%).

- Overnight pleasure visitors were more active than other overnight visitors were. Outdoor activities were by far the most popular among Ontario's overnight pleasure visitors (55.4%), followed by sightseeing (46.2%) and shopping (39.9%). Outdoor activities, visiting parks/historic sites and sightseeing were the activities that truly differentiated overnight pleasure visitors from other overnight visitors.

- On the other hand, Americans and overseas visitors on an overnight pleasure trip to Ontario were much more inclined to go sightseeing, to go shopping, to attend cultural events, to visit parks or historic sites and to participate in nightlife/entertainment. Surprisingly, overnight pleasure visitors from overseas countries had the highest incidence of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight pleasure visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

- The types of activities that overnight pleasure visitors from different origins engaged in imply that Ontario's overnight international pleasure visitors had, in 1999, a more urban orientation than its domestic overnight pleasure visitors did.

- Although Metro Toronto was the top region visited among all overnight visitors, accounting for 21.7% of them, it was Festival Country that rose to the top of the places visited in the province by overnight pleasure visitors (19.4%), followed by Lakelands (19.2%). Metro Toronto was in third place accounting for 15.7% of Ontario's overnight pleasure visitors.

- Given the outdoor nature of the overnight pleasure visitors, travel regions that offered more of an outdoor product (such as Ontario's northern regions, Lakelands and even Festival Country) faired better among this group of visitors than among other overnight visitors.

- Metro Toronto was the most popular region among overnight pleasure visitors from overseas countries, the second most popular region among American overnight pleasure visitors (shopping, cultural events and nightlife being the main attractions for the Americans) and the seventh most popular region among Ontario residents (who favoured Lakelands). These observations point out again to the urban/rural split between Ontario's international and domestic visitors.

- The expenditures of pleasure visitors accounted for 42.9% of the total spending in Ontario by all visitors, while the spending of the overnight pleasure visitors accounted for 41.8% of the total expenditures of all overnight visitors in the province. Overall, pleasure visitors had an average spending per person visit of $124, as compared to an average of $123 of the general visitor population. Overnight pleasure visitors had an average spending per person visit of $222, while the general overnight visitor of Ontario had a slightly higher average of $239 per person visit.

- Ontario residents had the lowest average spending per overnight pleasure visit ($128), as well as per overnight party visit ($247) and per overnight party per night ($90). Overnight pleasure visitors from the U.S. had an average spending per person visit that was over two and a half times higher than that of Ontarians' ($339), while overseas overnight pleasure visitors had an average per person visit spending that was almost three and a half times higher than that of Ontarians' ($858), partly because of high transportation costs to reach Ontario.

- International visitors were asked to rate various aspects of their stay in Ontario relative to their home country. The majority of the American visitors who were on an overnight pleasure trip to Ontario rated transportation services, accommodation services, hospitality of local people and the variety of things to see and do as essentially the same in Ontario as in the United States.

- Given the low value of the Canadian dollar during 1999, the majority of American overnight pleasure visitors also rated "value for money" as being better in Ontario than back home. Although "value for money" was the only item that was ranked by Americans as being better in Ontario than in the U.S., it also had the highest negative rating (14.6%), while the hospitality of local people received the lowest negative rating from overnight pleasure visitors from the United States.

- The majority of the overnight pleasure visitors from overseas countries rated the "hospitality of local people" as being better in Ontario than back home. For the remaining services, overseas visitors were divided between those ranking them as better in Ontario and those ranking them as the same. Overall, overseas visitors had a higher negative rating of transportation services than Americans, with Japanese visitors having one of the highest negative ratings of this service (32.8%).

- Overnight pleasure visits in Ontario increased by 5.6% between 1996 and 1998, and by 0.7% between 1998 and 1999. Compared to 1996, the number of overnight pleasure visitors in Ontario in 1999 increased by 6.3%.

- Compared to 1996, in 1999 the number of overnight pleasure visitors from Overseas declined by 25.0%, while the number of pleasure visitors from all other origins increased.

- POINTS SAILLANTS -

- En 1999, 106 millions de visites-personnes ont été faites en Ontario par des visiteurs de même jour et d'une nuit ou plus venus du Canada et de l'étranger. Ceux qui ont visité l'Ontario principalement par plaisir représentaient 42,6 % de ce total, soit 45,1 millions de visites-personnes. Les visiteurs d'agrément d'une nuit ou plus représentaient 40 % du total des visiteurs d'agrément, soit 18,0 millions de visites-personnes.

- Les trois-quarts des visiteurs d'agrément d'une nuit ou plus venaient de l'Ontario, du Michigan et de l'État de New York, les Ontariens représentant 86 % de ces trois marchés.

- Les Canadiens, à l'exception des résidents de Winnipeg, ont été plus nombreux à venir en Ontario pour une nuit ou plus pour d'autres raisons que par plaisir, tandis que c'est l'inverse est vrai pour les Américains (les Américains représentaient 19,6 % de tous les visiteurs d'une nuit ou plus en Ontario, mais 24,8 % des visiteurs d'agrément d'une nuit ou plus de la province).

- En 1999, les visiteurs d'agrément d'une nuit ou plus ont passé en moyenne 3,23 nuits en Ontario. Comme prévu, les visiteurs d'une nuit ou plus de pays d'outre-mer sont restés le plus longtemps (le R.-U. et l'Allemagne ayant enregistré les séjours les plus longs de tous les pays d'outre-mer), suivis par les Américains et les Canadiens.

- Les visiteurs d'agrément d'une nuit ou plus venus de l'ensemble du Canada, des É.-U. et d'outre-mer sont restés plus longtemps en Ontario que les visiteurs d'une nuit ou plus de la province. Les visiteurs d'une nuit ou plus venus au Canada de pays d'outre-mer en 1999 dans le but de visiter des amis ou des parents sont restés en Ontario deux fois plus longtemps (12,4 nuits) que les visiteurs d'agrément d'une nuit ou plus de ces pays.

- Près des deux tiers (62,2 %) des visiteurs d'agrément d'une nuit ou plus en Ontario sont restés dans la province deux nuits ou moins et 76,6 % sont restés trois nuits ou moins. Seulement 4,2 % des visiteurs d'agrément d'une nuit ou plus sont restés dans la province dix nuits ou plus.

- Les Ontariens faisant un voyage d'agrément d'une nuit ou plus en Ontario ont été les plus nombreux (81,6 %) à faire un court voyage (3 nuits ou moins) dans la province, suivis des Américains (72,2 %) et finalement des visiteurs d'outre-mer (41,7 %). En général, plus un visiteur de l'Ontario venait de loin, plus il restait longtemps dans la province.

- Les visiteurs d'agrément d'une nuit ou plus ont représenté 58,2 millions de nuits-personnes en Ontario, ou 46,2 % du total de nuits passées dans la province par tous les visiteurs d'une nuit ou plus.

- Comparativement aux autres visiteurs d'une nuit ou plus, les visiteurs d'agrément d'une nuit ou plus ont voyagé beaucoup plus pendant l'été et une proportion beaucoup plus faible a voyagé pendant l'hiver et l'automne. La majorité (52,0 %) des visiteurs d'agrément d'une nuit ou plus ont voyagé dans la province pendant la période de juillet à septembre (3e trimestre). Cette observation s'est maintenue dans la plupart des principaux marchés de l'Ontario, à l'exception du Japon (bien que la plus grande proportion de visiteurs d'agrément de cette région est venue en Ontario pendant l'été, cette proportion ne constitue pas la majorité).

- La majorité des visiteurs d'agrément d'une nuit ou plus qui ont visité l'Ontario au cours du premier trimestre civil sont restés dans des logements commerciaux couverts, tandis que la majorité de ceux qui ont voyagé en Ontario pendant le reste de l'année sont restés dans des logements non commerciaux et

dans des terrains de camping. Les premier et quatrième trimestres ont enregistré la plus grande proportion de visiteurs d'agrément d'une nuit ou plus qui sont restés chez des amis ou des parents, alors que le troisième trimestre a enregistré la plus grande proportion de visiteurs d'agrément d'une nuit ou plus qui sont restés dans un chalet privé.

- Étant donné qu'une proportion beaucoup plus élevée de visiteurs d'agrément d'une nuit ou plus qui ont visité l'Ontario au cours des premier et quatrième trimestres ont utilisé des logements commerciaux couverts, la moyenne de dépenses par visiteur d'agrément d'une nuit ou plus par nuit a été beaucoup plus élevée au cours des premier et quatrième trimestres qu'elle ne l'a été durant les deuxième et troisième trimestres.

- Bien que la plupart des visiteurs d'agrément d'une nuit ou plus en Ontario ont voyagé en groupe de deux personnes ou plus (79,8 %), un groupe important de visiteurs a voyagé seul (20,2 %). L'incidence des voyages sans compagnon a été la plus faible parmi les visiteurs d'agrément d'une nuit ou plus des É.-U. et de la France (seulement 13,5 % des visiteurs américains et 10,5 % des visiteurs français d'agrément qui sont venus en Ontario par plaisir pendant une nuit ou plus ont voyagé seul) et la plus élevée parmi les Canadiens (45,6 %).

- Huit groupes de voyageurs sur dix (80,3 %) qui ont visité l'Ontario pendant qu'ils étaient en voyage d'agrément d'une nuit ou plus ont voyagé en groupes composés d'adultes seulement, et environ deux sur dix (19,7 %) ont voyagé avec des enfants de moins de 15 ans. Des groupes composés d'adultes seulement, 48,3 % ont voyagé seuls, 44,1 % ont voyagé en groupes composés de deux adultes et 7,6 % en groupes de trois adultes ou plus.

- Les visiteurs d'agrément d'une nuit ou plus voyageant en groupes composés d'adultes ne représentent que 79,6 % des nuits passées en Ontario par plaisir. Puisque cette proportion est légèrement plus faible que la proportion correspondante des visites de groupes, on peut en déduire que les groupes qui voyagent avec des enfants sont restés plus longtemps en Ontario que les groupes voyageant avec des adultes seulement. Cela est particulièrement vrai pour les visiteurs d'agrément d'une nuit ou plus de l'Ontario, des autres provinces canadiennes, des É.-U., de l'Allemagne et du Japon. L'une des conséquences des séjours plus longs des groupes avec enfants est que même si ces visiteurs ne représentent que 19,7 % des groupes de voyageurs d'agrément d'une nuit ou plus en Ontario, ils représentent 20,9 % des dépenses totales engagées par les visiteurs d'agrément d'une nuit ou plus, ce qui en fait un segment de marché à rendement plus élevé que ceux qui voyagent en groupes d'adultes seulement.

- Comparativement aux autres visiteurs d'une nuit ou plus, les visiteurs d'agrément d'une nuit ou plus ont utilisé dans une proportion beaucoup plus grande les logements commerciaux couverts (43,3 % contre 34,9 %) et par conséquent ont utilisé moins les logements non commerciaux (39,6 % contre 56,6 %). Ils ont également utilisé dans une proportion beaucoup plus grande les terrains de camping et de caravaning (16,5 % contre 8,3 %).

- Près du tiers (29,9 %) des visiteurs d'agrément d'une nuit ou plus du Canada ont utilisé des logements commerciaux couverts, 19,9 % ont utilisé des terrains de camping et 49,1 % ont utilisé des logements non commerciaux, comme des résidences d'amis, de parents ou des chalets privés. D'autre part, 74,9 % des visiteurs d'agrément d'une nuit ou plus venant des É.-U. ont eu recours aux logements commerciaux couverts, 9,0 % ont utilisé des terrains de camping et seulement 14,7 % sont restés chez des amis ou des parents, ou dans des chalets privés. Les visiteurs d'agrément d'une nuit ou plus de pays d'outre-mer ont enregistré le plus haut taux d'utilisation de logements commerciaux couverts (77,5 %) et le plus faible taux d'utilisation de terrains de camping (4,3 %).

- Les visiteurs d'agrément d'une nuit ou plus ont été plus actifs que les autres visiteurs d'une nuit ou plus. Les activités extérieures ont été de loin les plus populaires parmi les visiteurs d'agrément d'une nuit ou

plus en Ontario (55,4 %), suivi des visites touristiques (46,2 %) et du magasinage (39,9 %). Les activités extérieures, les visites de parcs et de sites historiques et les visites touristiques ont été les activités qui ont vraiment distingué les visiteurs d'agrément d'une nuit ou plus des autres visiteurs d'une nuit ou plus.

- D'autre part, les visiteurs américains et de pays d'outre-mer qui ont fait un voyage d'agrément d'une nuit ou plus en Ontario ont eu beaucoup plus tendance à faire des visites touristiques, à magasiner, à assister à des événements culturels, à visiter des parcs ou des sites historiques et à participer à la vie nocturne et aux divertissements. Étonnamment, les visiteurs d'agrément d'une nuit ou plus des pays d'outre-mer ont été les plus nombreux à visiter des amis ou des parents et les plus nombreux à visiter un parc d'attractions (cette dernière observation est surprenante parce que les visiteurs d'agrément d'une nuit ou plus des pays étrangers sont ceux qui ont voyagé le moins avec des enfants de moins de 15 ans).

- Le type d'activités exercées par les visiteurs d'agrément d'une nuit ou plus de différentes origines porte à croire que les visiteurs d'agrément d'une nuit ou plus de l'étranger qui viennent en Ontario avaient, en 1999, une destination plus urbaine que les visiteurs d'agrément d'une nuit ou plus venus du Canada.

- Bien que le Grand Toronto ait été la région la plus visitée par tous les visiteurs d'une nuit ou plus, soit 21,7 % d'entre eux, c'est le Pays des festivals qui se situe au sommet des endroits de la province visités par les visiteurs d'agrément d'une nuit ou plus (19,4 %), suivi du Pays des lacs (19,2 %). Le Grand Toronto est arrivé en troisième place, avec 15,7 % des visiteurs d'agrément d'une nuit ou plus en Ontario.

- Étant donné le goût pour le plein air des visiteurs d'agrément d'une nuit ou plus, les régions touristiques qui offraient davantage de produits de plein air (comme les régions du nord de l'Ontario, le Pays des lacs et même le Pays des festivals) ont été plus populaires auprès de ce groupe de visiteurs qu'auprès des autres visiteurs d'une nuit ou plus.

- Le Grand Toronto a été la région la plus populaire chez les visiteurs d'agrément d'une nuit ou plus venus des pays d'outre-mer, la deuxième région la plus populaire parmi les visiteurs d'agrément d'une nuit ou plus des É.-U. (le magasinage, les événements culturels et la vie nocturne étant les principales attractions pour les Américains) et la septième région la plus populaire parmi les résidents de l'Ontario (qui ont préféré le Pays des lacs). Ces observations soulignent encore la division dans le choix des régions urbaines ou rurales entre les visiteurs de l'étranger et du Canada.

- Les dépenses des visiteurs d'agrément ont représenté 42,9 % des dépenses totales faites en Ontario par tous les visiteurs, tandis que les dépenses des visiteurs d'agrément d'une nuit ou plus ont représenté 41,8 % des dépenses totales de tous les visiteurs d'une nuit ou plus dans la province. Dans l'ensemble, les visiteurs d'agrément ont dépensé en moyenne par visite-personne 124 $, comparativement à une moyenne de 123 $ pour l'ensemble des visiteurs. Les visiteurs d'agrément d'une nuit ou plus ont dépensé en moyenne par visite-personne 222 $, tandis que l'ensemble des visiteurs d'une nuit ou plus venus en Ontario avaient une moyenne légèrement plus élevée de 239 $ par visite-personne.

- Les résidents de l'Ontario avaient la moyenne la plus faible de dépenses par visite d'agrément d'une nuit ou plus (128 $), ainsi que par visite de groupe d'une nuit ou plus (247 $) et par groupe par nuit (90 $). Les visiteurs d'agrément d'une nuit ou plus des É.-U. ont dépensé en moyenne par visite-personne plus de deux fois et demie plus que les Ontariens (339 $), alors que les visiteurs d'agrément d'une nuit ou plus d'outre-mer ont dépensé en moyenne par visite-personne près de trois fois et demie plus que les Ontariens (858 $), en partie en raison des coûts de transport élevés pour se rendre en Ontario.

- On a demandé aux visiteurs étrangers de coter divers aspects de leur séjour en Ontario par rapport à leur pays de résidence. La majorité des visiteurs américains qui faisaient un voyage d'agrément d'une nuit ou plus en Ontario ont coté les services de transport, les services de logement, l'hospitalité des habitants locaux et la diversité de choses à voir et à faire comme étant essentiellement les mêmes en Ontario qu'aux États-Unis.

- Étant donné la faible valeur du dollar canadien en 1999, la majorité des visiteurs d'agrément d'une nuit ou plus des É.-U. ont aussi coté « le rapport qualité-prix » comme étant meilleur en Ontario que dans leur pays. Bien que le « rapport qualité-prix » ait été le seul élément ayant été coté par les Américains comme étant meilleur en Ontario qu'aux É.-U., il a aussi eu la cote négative la plus élevée (14,6 %), alors que l'hospitalité des habitants locaux a reçu la cote négative la moins élevée des visiteurs d'agrément d'une nuit ou plus venus des États-Unis.

- La majorité des visiteurs d'agrément d'une nuit ou plus venus de pays d'outre-mer ont coté « l'hospitalité des habitants locaux » comme étant meilleure en Ontario que dans leur pays. Pour ce qui est des autres services, les visiteurs d'outre-mer ont été divisés entre ceux qui ont accordé une meilleure cote à l'Ontario et ceux qui les ont cotés comme étant semblables. Dans l'ensemble, les visiteurs d'outre-mer ont donné une cote négative plus élevée pour les services de transport que les Américains, les Japonais ayant donné l'une des cotes les plus négatives pour ce service (32,8 %).

- Les visites d'agrément d'une nuit ou plus en Ontario ont augmenté de 5,6 % entre 1996 et 1998, et de 0,7 % entre 1998 et 1999. Comparativement à 1996, le nombre de visiteurs d'agrément restés une nuit ou plus en Ontario en 1999 a augmenté de 6,3 %.

- Comparativement à 1996, le nombre de visiteurs d'agrément d'une nuit ou plus venus de pays d'outre-mer a chuté de 25,0 % en 1999, tandis que le nombre de visiteurs d'agrément d'une nuit ou plus de toutes les autres origines a augmenté.

- Introduction -

The information contained in this report, with the exception of the historical data, was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Tourism, Culture and Recreation.

The historical data up to 1995 contained in this report are based on information obtained from the ITS and on revised estimates of the CTS done by OMTOUR (see Ontario's Domestic Travel Markets: 1978-1995").

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada annually (starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 1999, an average of 14,530 Canadian households -- including 4,117 Ontario households -- were surveyed every month throughout the year. The average response rate for Canadian and Ontario respondents was around 90%.

While up to 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, starting in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable pre and post 1996 and not total domestic visits. In addition to the change in the location question, starting in 1996, the CTS captured the interview data on a CAI system, rather than on paper as was the case up to 1994.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

1. All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of at least 40 kms are included in this report. Statistics Canada reports only trips of 80 kms and over.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report's domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year. A domestic trip must also meet a distance requirement as follows:

Length of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Same Day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to a sample of travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada.

The international statistics presented in this report are based on the census of US and overseas visitors as far as the number of travellers, their origin and the mode of transport are concerned. Most of the remaining trip characteristics were obtained from 17,719 completed questionnaires by US residents (out of 34,696 usable questionnaires of US visitors to Canada and 4,046 completed questionnaires by overseas visitors (out of 8,022 usable questionnaires of overseas visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of key terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO'S OVERNIGHT PLEASURE TRAVEL MARKET - 1999

HOW MANY PLEASURE VISITORS AND WHERE DID THEY COME FROM?

In 1999, 106 million person visits were made in Ontario by same day and overnight visitors from across Canada and around the world. Those who visited Ontario primarily for pleasure accounted for 42.6% of this total, or for 45.1 million person visits.

As was the case with the general visitor population, most of the Ontario pleasure visitors did not stay in the province overnight. However, as the pie charts indicate, pleasure visitors had a higher incidence of overnight stay than other visitors did.

Three-quarters of Ontario's overnight pleasure visitors came from Ontario, Michigan and New York, with Ontario accounting for 86% of the three origins.

Out of every twenty overnight pleasure visitors who visited Ontario in 1999, thirteen came from Ontario (65.5%), five from the U.S. (24.8%), one from a province other than Ontario (5.1%) and one from an overseas country (4.6%). With respect to the overnight pleasure visitors from overseas countries, out of every twenty that visited Ontario in 1999, five from Japan (22.5%), four came from the U.K. (21.2%), two from France (11.6%), and two from Germany (9.1%).

Although Toronto generated 9.0% of Ontario's overnight pleasure visitors, this share was much smaller than its share of Ontario's population (40.6% in 1999), implying that its residents did not have a very high incidence of overnight pleasure travel in their own province. Among the remaining municipalities, Ottawa generated the second largest number of overnight pleasure visits in Ontario (4.6%).

A look at Table 1 reveals that Canadians, with the exception of those living in Winnipeg, had a higher incidence of overnight non-pleasure travel to Ontario than overnight pleasure travel, while the Americans had a much higher incidence of pleasure travel to Ontario than non-pleasure travel (Americans accounted for 19.6% of all overnight visitors to Ontario, but for 24.8% of the province's overnight pleasure visitors). The table also reveals that the overwhelming majority of Ontario's overnight visitors from Taiwan, China and South Korea came to the province for reasons other than those associated with a pleasure trip.

TABLE 1: Overnight Person Visits in Ontario, 1999

Origin of Visitors (000's)	All Visitors	Share (%)	Pleasure Visitors	Share (%)
TOTAL	39,842	100.0%	17,977	100.0%
CANADA	30,175	75.7%	12,678	70.5%
ONTARIO	26,887	67.5%	11,781	65.5%
Toronto	3,430	8.6%	1,613	9.0%
Ottawa	1,921	4.8%	828	4.6%
Niagara	555	1.4%	193	1.1%
Windsor	650	1.6%	292	1.6%
QUEBEC	1,685	4.2%	411	2.3%
Montreal	1,290	3.2%	314	1.7%
Quebec City	63	0.2%	2	*
MANITOBA	512	1.3%	257	1.4%
Winnipeg	435	1.1%	221	1.2%
ATLANTIC CANADA	363	0.9%	90	0.5%
Halifax	91	0.2%	16	0.1%
WESTERN CANADA	728	1.8%	140	0.8%
Vancouver	219	0.5%	35	0.2%
Calgary	175	0.4%	39	0.2%
Edmonton	82	0.2%	7	*
Regina	22	0.1%	2	*
Saskatoon	18	*	3	*
USA	7,792	19.6%	4,464	24.8%
Border States	5,295	13.3%	3,370	18.7%
Michigan	1,661	4.2%	1,006	5.6%
New York	1,449	3.6%	886	4.9%
Ohio	700	1.8%	511	2.8%
Pennsylvania	484	1.2%	331	1.8%
Illinois	415	1.0%	241	1.3%
Minnesota	308	0.8%	210	1.2%
Wisconsin	277	0.7%	185	1.0%
Other USA	2,497	6.3%	1,094	6.1%
California	255	0.6%	89	0.5%
New Jersey	199	0.5%	84	0.5%
Massachusetts	150	0.4%	52	0.3%
Florida	143	0.4%	60	0.3%
OVERSEAS	1,875	4.7%	835	4.6%
UK	382	1.0%	177	1.0%
Japan	218	0.5%	118	0.7%
France	157	0.4%	97	0.5%
Germany	135	0.3%	76	0.4%
Hong Kong	66	0.2%	27	0.2%
Italy	63	0.2%	24	0.1%
Australia	49	0.1%	24	0.1%
Mexico	56	0.1%	19	0.1%
Netherlands	57	0.1%	28	0.2%
Taiwan	56	0.1%	19	0.1%
China	40	0.1%	10	0.1%
South Korea	52	0.1%	16	0.1%
India	33	0.1%	19	0.1%
Israel	30	0.1%	8	*
Switzerland	27	0.1%	12	0.1%
Brazil	19	*	14	0.1%

*Less than 0.1%.

HOW LONG DID THEY STAY IN ONTARIO?

Overall, Ontario's overnight visitors, spent 3.16 nights in the province in 1999. Ontario's overnight pleasure visitors spent 3.23 nights in the province in 1999. As expected, overseas overnight visitors stayed the longest (with UK and Germany having the longest lengths of stay among overseas countries), followed by Americans and Canadians.

Overnight pleasure visitors from Canada as a whole stayed longer in Ontario than overnight visitors from within the province, while for Americans and overseas visitors the opposite was true. Overnight overseas visitors who came to Canada in 1999 for the purpose of visiting their friends or relatives stayed in Ontario nearly twice as long (12.4 nights) as overnight pleasure visitors from these countries.

Close to two-thirds (62.2%) of Ontario's overnight pleasure visitors stayed in the province for two nights or less and 76.6% stayed for three nights or less. Only 4.2% of Ontario's overnight pleasure visitors stayed in the province for ten or more nights.

Ontarians on an overnight pleasure trip in Ontario had the highest incidence (81.6%) of taking a short getaway trip (3 nights or less) in the province, followed by Americans (72.2%) and finally overseas visitors (41.7%). In general, the further away a visitor to Ontario came from, the longer he/she stayed in the province.

The relationship between the proximity of a visitor's residence to Ontario and this visitor's length of stay in the province is also evident when tables 1 and 2 are compared. With a few minor exceptions, these tables show that the nearer a region is to Ontario, the smaller its share of person nights and the larger its share of person visits.

Overnight pleasure visitors generated 58.2 million of person nights in Ontario, or 46.2% of the total nights generated in the province by all overnight visitors.

Table 1 uses overnight person visits as the yardstick for ranking the various markets in terms of their importance to Ontario. However, if the number of person nights generated from each origin is used as the yardstick for ranking each market, then, as Table 2 shows, some significant changes are observed. For example, Florida becomes a more important market than California.

Among the overseas countries, Germany becomes more important than France and Japan, and France becomes more important than Japan. Furthermore, Taiwan rises from the 6th position, among overseas countries, to the 3rd position.

TABLE 3: Overnight Visitors by Length of Stay in Ontario

Origin of Visitors	Average Number of Nights	
	All Visitors	Pleasure Visitors
Canada	2.77	2.94
Ontario	2.55	2.84
USA	3.32	3.33
Border States	2.97	3.05
Overseas	8.66	7.18

TABLE 2: Person Nights in Ontario, 1999

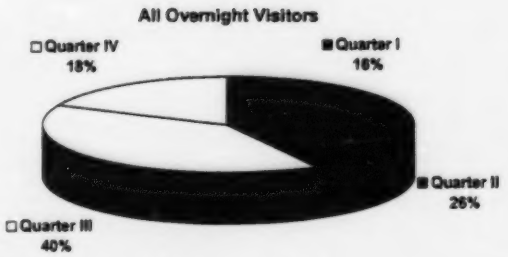
Origin of Visitors (000's)	All Visitors	Share (%)	Pleasure Visitors	Share (%)
TOTAL	125,862	100.0%	58,164	100.0%
CANADA	83,725	66.5%	37,310	64.1%
ONTARIO	68,643	54.5%	33,483	57.6%
Toronto	9,911	7.9%	5,401	9.3%
Ottawa	5,131	4.1%	2,267	3.9%
Niagara	1,661	1.3%	855	1.5%
Windsor	1,753	1.4%	768	1.3%
QUEBEC	5,347	4.2%	1,379	2.4%
Montreal	3,793	3.0%	974	1.7%
Quebec City	196	0.2%	9	*
MANITOBA	2,212	1.8%	913	1.6%
Winnipeg	1,870	1.5%	776	1.3%
ATLANTIC CANADA	2,297	1.8%	457	0.8%
Halifax	516	0.4%	73	0.1%
WESTERN CANADA	5,227	4.2%	1,077	1.9%
Vancouver	1,457	1.2%	275	0.5%
Calgary	1,153	0.9%	149	0.3%
Edmonton	680	0.5%	158	0.3%
Regina	170	0.1%	7	*
Saskatoon	125	0.1%	33	0.1%
USA	25,893	20.6%	14,863	25.6%
Border States	15,719	12.5%	10,295	17.7%
Michigan	3,894	3.1%	2,503	4.3%
New York	4,142	3.3%	2,606	4.5%
Ohio	2,114	1.7%	1,418	2.4%
Pennsylvania	1,719	1.4%	1,198	2.1%
Illinois	1,546	1.2%	972	1.7%
Minnesota	1,082	0.9%	753	1.3%
Wisconsin	1,221	1.0%	845	1.5%
Other USA	10,175	8.1%	4,568	7.9%
California	1,195	0.9%	463	0.8%
New Jersey	696	0.6%	371	0.6%
Massachusetts	425	0.3%	171	0.3%
Florida	1,016	0.8%	573	1.0%
OVERSEAS	16,243	12.9%	5,991	10.3%
UK	3,629	2.9%	1,426	2.5%
Japan	743	0.6%	286	0.5%
France	813	0.6%	416	0.7%
Germany	1,219	1.0%	646	1.1%
Hong Kong	505	0.4%	187	0.3%
Italy	585	0.5%	176	0.3%
Australia	437	0.3%	149	0.3%
Mexico	333	0.3%	114	0.2%
Netherlands	634	0.5%	306	0.5%
Taiwan	922	0.7%	497	0.9%
China	429	0.3%	65	0.1%
South Korea	298	0.2%	90	0.2%
India	254	0.2%	116	0.2%
Israel	238	0.2%	23	*
Switzerland	166	0.1%	97	0.2%
Brazil	114	0.1%	51	0.1%

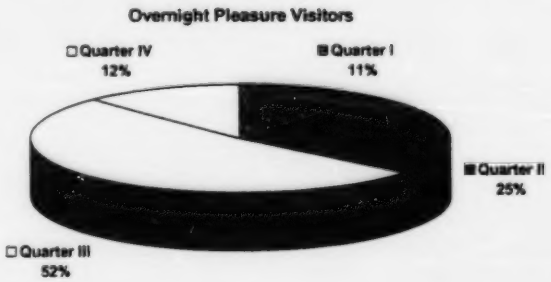
*Less than 0.1%.

WHEN DID THEY VISIT ONTARIO?

Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of travel during the summer and a much lower incidence of travel during the winter and fall.

The majority (52.0%) of Ontario's overnight pleasure visitors travelled in the province during the July-September period (3rd quarter). This observation-held across most of Ontario's main markets, with the exception Japan (although the largest proportion of pleasure visitors from this region came to Ontario during the summer, this proportion did not constitute a majority).





Among Ontario's main overnight pleasure markets, Ontarians had the highest incidence of travel in Ontario during the first calendar quarter (12.5%), Japanese visitors had the highest incidence of travel during the second quarter (34.7%), French visitors had the highest incidence of travel during the third calendar quarter (55.7%) and visitors from the U.K. had the highest incidence of travel during the fourth calendar quarter (20.3%). As Table 4 indicates, overseas and U.S. overnight pleasure visitors accounted for a higher proportion of Ontario's overnight pleasure visitors during the second and fourth calendar quarters, while Canadians accounted for a larger proportion during the first and third calendar quarters.

TABLE 4: Overnight Pleasure Visits in Ontario by Calendar Quarter, 1990

Origin of Visitors	QI	QII	QIII	QIV
TOTAL	1,992	4,907	9,341	2,200
CANADA (000)	1,574	3,497	6,566	1,503
Share (%)	*79.0*	*71.3*	*70.3*	*68.3*
Ontario	1,477	2,847	6,066	1,391
Share (%)	*74.1*	*58.0*	*64.9*	*63.2*
USA (000)	368	1,147	2,372	578
Share (%)	*18.5*	*23.4*	*25.4*	*26.3*
Border States	342	839	1,717	472
Share (%)	*2.5*	*17.2*	*18.4*	*21.5*
OVERSEAS (000)	50	263	403	119
Share(%)	*2.5*	*5.4*	*4.3*	*5.4*
UK	11	54	76	36
Share (%)	*0.6*	*1.1*	*0.8*	*1.6*
France	1	30	54	11
Share (%)	*0.1*	*0.6*	*0.6*	*0.5*
Germany	3	26	38	10
Share(%)	*0.2*	*0.5*	*0.4*	*0.5*
Japan	10	41	58	10
Share(%)	*0.5*	*0.8*	*0.6*	*0.5*

Some significant differences in the habits of overnight pleasure visitors travelling during different calendar quarters were observed and presented in Table 5. The majority of the overnight pleasure visitors who were visiting Ontario during the first calendar quarter stayed in commercial roofed accommodation, while the majority of those travelling in Ontario during the remainder of the year stayed in non-commercial accommodation and campgrounds.

The first and fourth quarters received the largest share of overnight pleasure visitors who stayed at the homes of friends or relatives, while the second quarter received the largest share of overnight pleasure visitors who stayed at a private cottage.

Because a much higher proportion of the overnight pleasure visitors who visited Ontario during the first and fourth quarters used commercial roofed accommodation, the average spending per overnight pleasure visitor-per night was much higher during the first and fourth quarters than it was during the second and third quarters.

TABLE 5: Overnight Pleasure Visitors in Ontario by Calendar Quarter, 1999

	QI	QII	QIII	QIV
% of overnight pleasure visitors using commercial roofed accommodation	53.1	40.9	38.1	47.7
% of overnight pleasure visitors using hotels	36.7	23.6	18.7	31.7
% of overnight pleasure visitors using the homes of friends or relatives	24.2	11.1	11.3	22.6
% of overnight pleasure visitors using private cottages	19.7	28.5	26.3	21.5
% of overnight pleasure visitors using campgrounds or trailer parks	0.8	16.2	22.6	5.0
Average length of stay in Ontario of overnight pleasure visitors (nights)	2.14	3.01	3.71	2.67
% of overnight pleasure visitors' spending, by quarter	12.0	25.2	45.9	16.9
Average spending per overnight pleasure visitor	$338	$318	$275	$429
Average spending per overnight pleasure visitor per night	$158	$105	$74	$161

The majority of the overnight pleasure visitors from overseas countries and the U.S. stayed in commercial roofed accommodation irrespective of the calendar quarter.

HOW DID THEY TRAVEL WHILE IN CANADA?

While in Canada, the overwhelming majority of Ontario's overnight pleasure visitors (88.7%) used the automobile to travel to Ontario destinations. The automobile was followed in popularity by the bus (6.4%), the plane (3.0%) and the train (2.1%).

As expected, Canadian visitors had the highest incidence of automobile use (94.3%), followed by the Americans (77.8%). Compared to Canadians and Americans, overnight pleasure visitors from overseas countries had a much higher incidence of using a bus (38.6%), plane (19.8%) and train (14.5%) utilisation while in Canada.

WHAT WAS THE SIZE AND COMPOSITION OF THEIR TRAVELLING PARTY?

TABLE 6: Overnight Party Visits in Ontario Main Purpose Pleasure, 1999

		Party Composition	
		Adults Only (%)	Adults with Kids (%)
CANADA	1.9	79.6%	20.4%
Ontario	1.9	79.5%	20.5%
USA	2.5	81.7%	18.3%
Border States	2.6	81.2%	18.9%
OVERSEAS	2.2	88.3%	11.7%
UK	2.1	92.3%	9.0%
France	2.1	88.9%	11.1%
Germany	2.2	87.1%	12.9%
Japan	2.6	88.9%	11.1%

Although most of the overnight pleasure visitors in Ontario travelled in groups of two or more persons (79.8%), a sizeable group travelled alone (20.2%). The incidence of travelling with no companions was the lowest among French and American overnight pleasure visitors (only 13.5% of the Americans and 10.5% of the French overnight pleasure visitors travelled alone in Ontario) and the highest among Canadians (45.6%).

Eight out of every ten travel parties (80.3%) who were visiting Ontario while on an overnight pleasure trip travelled in groups comprised of adults only, and about two-in-ten (19.7%) travelled with children under the age of 15. Of

those travelling in adult parties, 48.3% travelled alone, 44.1% travelled in groups comprised of two adults and 7.6% in groups comprised of three or more adults.

The incidence of travel in groups comprised of two adults only was the highest among French, U.K. and German visitors (66.0%, 63.2% and 55.2%, respectively, of all the overnight pleasure visitors from these countries travelled in groups of two adults).

Relative to other groups, Ontarians and other Canadians, had a low incidence of travel in groups comprised of two adults only (30.9% and 30.6%, respectively) and the highest incidence of travelling alone (45.1% and 45.6%, respectively), while Ontarians had the highest incidence of travelling with children (20.5%).

Overnight pleasure visitors travelling in parties comprised of adults only generated 79.6% of the party nights spent in Ontario in 1999 for the purpose of pleasure. Since this share is slightly lower than their corresponding share of party visits, this implies that travelling parties with children stayed longer in Ontario than travelling parties with adults only. This was especially true for overnight pleasure visitors from Ontario, other Canadian provinces, the U.S., Germany and Japan. A consequence of the longer length of stay of parties with children was the fact that although these visitors accounted for 19.7% of Ontario's overnight pleasure parties, they accounted for 20.9% of the total expenditures incurred by overnight pleasure visitors in Ontario, rendering them a higher yield market segment than those travelling in adults-only parties.

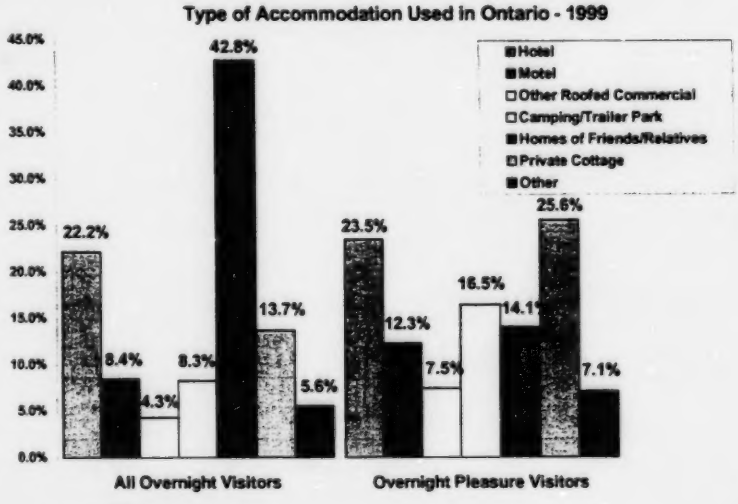
WHAT TYPE OF ACCOMMODATION DID THEY USE?

Compared to other overnight visitors, overnight pleasure visitors had a much higher incidence of utilisation of roofed commercial accommodation (43.3% vs. 34.9%) and consequently a lower usage of non-commercial accommodation (39.6% vs. 56.6%). They also had a much higher incidence of utilization of camping/trailer parks (16.5% vs. 8.3%).

TABLE 7: Overnight Pleasure Visitors in Ontario
Average Number of Person Nights by Accommodation Type, 1999

Type of Accommodation	Canada	Ontario	USA	Overseas
Hotel	1.90	1.81	2.18	3.60
Motel	1.72	1.68	1.86	3.00
Other roofed commercial	3.69	3.35	5.64	5.41
Camping/trailer park	3.00	2.87	3.26	5.70
Any roofed commercial	2.22	2.15	2.83	4.01
Any non-commercial	3.11	3.03	4.14	11.28

These observations varied considerably among overnight pleasure visitors from different origins. For example, only 29.9% of the Canadian overnight pleasure visitors used roofed commercial accommodation, 19.9% used campgrounds and 49.1% used non-commercial accommodation, such as the homes of friends/relatives or private cottages. On the other hand, 74.9% of the overnight pleasure visitors from the U.S. used commercial roofed accommodation, 9.0% used campgrounds and only 14.7% used homes of friends or



relatives, or private cottages. Overnight pleasure visitors from overseas countries had the highest incidence of utilisation of commercial roofed accommodation (77.5%) and the lowest incidence of utilisation of campgrounds (4.3%).

Overnight pleasure visitors from overseas countries who stayed in the homes of their friends or relatives, or in private cottages had the highest average length of stay in Ontario, followed by overnight pleasure visitors from overseas countries who used campgrounds and Americans who used a commercial roofed accommodation other than a hotel or a motel (such as commercial cottage, resort, bed and breakfast). Hotels and motels had the lowest average length of stay irrespective of the visitor's origin. As such, although hotels accounted for 23.5% and motels for 12.3% of Ontario's overnight pleasure visitors, these two types of accommodation only accounted for 16.0% and 7.1%, respectively, of the nights spent in the province by overnight pleasure visitors.

TABLE 8: Overnight Visitors in Ontario
Activities Participated in During the Trip, 1999

Activity (000's)	All Visitors	Share %	Pleasure Visitors	Share %
Visit Friends/ Relatives	23,149	58.1%	6,316	35.1%
Attend Festivals/Fairs	2,093	5.3%	1,250	7.0%
Attend Cultural Events	5,257	13.2%	3,413	19.0%
Attend Sports Events	2,151	5.4%	1,321	7.3%
Shopping	13,818	34.7%	7,175	39.9%
Sightseeing	12,179	30.6%	8,306	46.2%
Nightlife/Entertainment	4,815	12.1%	2,404	13.4%
Visit Theme Parks	1,303	3.3%	906	5.0%
Visit Parks or Historic Sites	5,593	14.0%	4,042	22.5%
Participate in Outdoor Activities	14,646	36.8%	9,956	55.4%

WHAT DID THEY DO IN ONTARIO?

TABLE 9: Overnight Pleasure Visitors in Ontario
Percent of Visitors Who Participated in Selected Activities, 1999

Activity	Origin of Overnight Pleasure Visitors			
	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	40.1%	39.5%	19.0%	45.3%
Attend Festivals/Fair	5.9%	5.8%	9.0%	12.2%
Attend Cultural Events	11.2%	9.8%	35.3%	50.4%
Attend Sports Events	7.9%	7.7%	5.5%	9.6%
Shopping	28.2%	27.1%	65.1%	83.4%
Sightseeing	37.3%	35.6%	63.3%	90.2%
Nightlife/Entertainment	10.7%	10.2%	19.2%	22.9%
Visit Theme Parks	3.7%	3.1%	6.0%	19.9%
Visit Parks or Historic Sites	13.7%	12.7%	39.7%	63.2%
Participate in Outdoor Activities	63.0%	63.9%	38.7%	28.5%

Overnight pleasure visitors were more active than other overnight visitors. On average, these visitors participated in 2.51 of the activities listed in Table 8, as opposed to 2.13 activities for the overall overnight visitors.

Outdoor activities were by far the most popular among Ontario's overnight pleasure visitors (55.4%), followed by sightseeing (46.2%) and shopping (39.9%). Outdoor activities, visiting parks/historic sites and sightseeing were the activities that truly differentiated overnight pleasure visitors from other overnight visitors.

Ontarians and other Canadians who visited the province on an overnight pleasure trip were much more inclined to participate in outdoor activities than the corresponding American or overseas overnight pleasure

TABLE 10: Overnight Visitors in Ontario Average Spending in Ontario by Activity Group, 1999		
Activity	Average Spending per Visitor	
	All Visitors	Pleasure Visitors
Visit Friend or Relative	$175	$201
Attend Festivals/Fairs	$381	$352
Attend Cultural Events	$475	$407
Attend Sports Events	$364	$297
Shopping	$387	$346
Sightseeing	$378	$310
Nightlife/Entertainment	$452	$393
Visit Theme Parks	$488	$404
Visit Parks or Historic Sites	$436	$362
Participate in Outdoor Activities	$200	$183

visitors (63.9% of Ontarians did so as opposed to 38.7% of Americans and 28.5% of overseas overnight pleasure visitors).

On the other hand, Americans and overseas visitors on an overnight pleasure trip to Ontario were much more inclined to go sightseeing, to go shopping, to attend cultural events, to visit parks or historic sites and to participate in nightlife/entertainment. Surprisingly, overnight pleasure visitors from overseas countries had the highest incidence of visiting friends or relatives and the highest incidence of visiting a theme park (the latter is surprising because overnight pleasure visitors from overseas countries had the lowest incidence of travel with children under the age of 15).

Overnight pleasure visitors from overseas countries were the most active in Ontario participating, on average, in 4.26 activities, while those from the U.S. and Ontario participated, on average, in 3.01 and 2.15 activities, respectively.

The types of activities that overnight pleasure visitors from different origins engaged in imply that Ontario's overnight international pleasure visitors had, in 1999, a more urban orientation than its domestic overnight pleasure visitors.

When the average spending of the various activity groups is compared across overnight pleasure visitors and total overnight visitors (Table 10), we observe that irrespective of the activity group, overnight pleasure visitors had a lower average spending than total overnight visitors. Ranging from 8.5% less for those who participated in outdoor activities to 14.3% less for those who attended cultural events. With the exception of those who visited friends or relatives. This is so because the category "total overnight visitors" includes a portion of overnight business visitors who, in turn, spend much more per visit than any other visitor.

TABLE 11: Overnight Pleasure Visitors in Ontario Average Spending in Ontario by Activity Group and Origin, 1999				
Activity	Origin of Overnight Pleasure Visitors			
	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	$118	$106	$339	$1,000
Attend Festivals/Fair	$221	$212	$447	$936
Attend Cultural Events	$287	$270	$359	$989
Attend Sports Events	$187	$176	$448	$1,198
Shopping	$217	$206	$364	$926
Sightseeing	$193	$184	$343	$918
Night-life/ Entertainment	$306	$299	$396	$999
Visit Theme Parks	$221	$220	$326	$1,050
Visit Parks/Historic Sites	$220	$207	$328	$948
Participate in Outdoor Activities	$116	$111	$377	$1,027

Within the overnight pleasure group, those who visited theme parks had the highest average spending per person visit than any other activity group ($488), followed by cultural visitors ($475) and visitors who engaged

in nightlife and entertainment ($452).

As expected, overnight pleasure visitors from overseas countries had the highest per visitor spending in Ontario than any other overnight pleasure visitor. Among the overnight pleasure visitors from overseas countries, those who attended sports events had the highest average spending, followed by those who visited theme parks and those who participated in outdoor activities. However, it is interesting to note in Table 11 that the overnight pleasure visitors from overseas countries who visited friends or relatives were the fourth highest yield activity group among all activity groups from all origins. This was so because, as previously mentioned, these visitors stayed in Ontario longer than any other overnight pleasure sub-group.

From a marketing perspective, the average spending per person visit indicates the value that Ontario will receive by attracting one more visitor from a particular market segment. Although this value may provide some guidance for niche marketing programs, a high average spending per visitor does not necessarily imply a high importance for a particular market segment. The importance of a particular market segment is determined by the total contribution that this market segment makes to Ontario's tourism revenues – a value that is obtained by not only looking at average per visitor spending, but also at the total number of visitors comprising a particular market segment. This is illustrated in Table 12.

As can be seen in Table 12, the most important market segments are not the high yield ones, but rather the U.S. shoppers, the U.S. overnight pleasure visitors who, among other things, went sightseeing and the Ontario outdoor enthusiasts. Although as noted earlier, these market segments, and especially the outdoor enthusiasts from Ontario, are not among the high yield segments.

TABLE 12: Overnight Pleasure Visitors in Ontario
Total Spending in Ontario by Activity Group and Origin, 1999

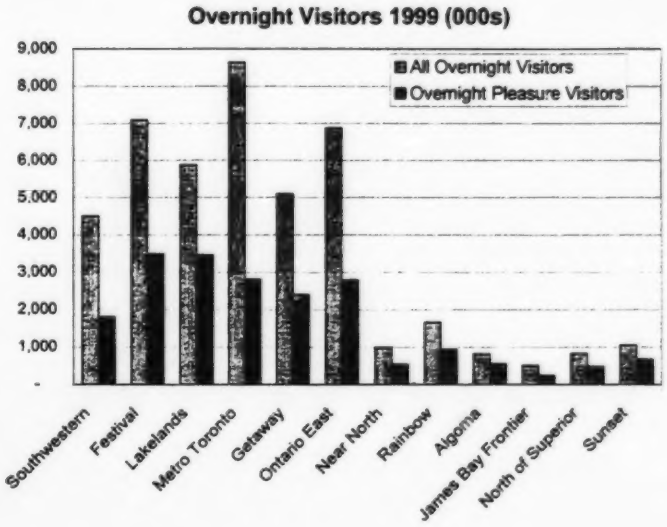
Activity	Origin of Overnight Pleasure Visitors				
	Total	Canada	Ontario	USA	Overseas
Visit Friends/Relatives	$1,266,442	$600,420	$493,840	$287,884	$378,138
Attend Festivals/Fair	$440,165	$165,091	$143,658	$179,570	$95,504
Attend Cultural Events	$1,387,975	$406,222	$312,147	$565,466	$416,287
Attend Sports Events	$392,112	$186,874	$160,819	$109,377	$95,861
Shopping	$2,480,329	$776,478	$655,181	$1,059,269	$644,582
Sightseeing	$2,574,028	$913,468	$769,168	$969,343	$691,217
Night-life/ Entertainment	$945,578	$414,956	$359,460	$339,792	$190,830
Visit Theme Parks	$366,378	$104,235	$80,780	$87,802	$174,341
Visit Parks/Historic Sites	$1,464,964	$383,448	$310,074	$581,109	$500,407
Participate in Outdoor Activities	$1,825,375	$929,403	$834,792	$651,508	$244,464
Total Spending of Overnight Pleasure Visitors	$3,991,723	$1,716,165	$1,052,679	$1,512,386	$763,172

WHICH ONTARIO REGIONS DID THEY VISIT?

Although Metro Toronto was the top region visited among all overnight visitors, accounting for 21.7%, it was Festival Country that rose to the top of the places visited by overnight pleasure visitors (19.4%), followed by Lakelands (19.2%). Metro Toronto was in third place accounting for 15.7% of Ontario's overnight pleasure visitors.

As indicated earlier, given the outdoor nature of the overnight pleasure visitors, travel regions that offered more of an outdoor product (such as Ontario's northern regions, Lakelands and even Festival Country) faired better among this group of visitors than among other overnight visitors.

Metro Toronto was the most popular region among overnight pleasure visitors from overseas countries, the second most popular region among American overnight pleasure visitors (shopping, cultural events and nightlife being the main attractions for the Americans) and the seventh most popular region among Ontario residents (who favoured Lakelands). These observations point out again to the urban/rural split between Ontario's international and domestic visitors.



Festival Country was the most popular region among overnight pleasure visitors from the U.S. and second in popularity among the overnight pleasure visitors from overseas countries - a result largely attributable to the draw of the Niagara Falls and, since 1998, the casino. For the Japanese pleasure visitors Festival Country was the top Ontario region visited, surpassing Toronto. This is not surprising given the fact that a large number of Japanese visitors come to Ontario through the United States.

As was the case with Metro Toronto, Festival Country did not fair very well among domestic visitors. It was rather the regions of Lakelands and Getaway Country that were the most popular among the domestic overnight pleasure visitors.

Ontario East was the second most popular region for overnight pleasure visitors from France (partly because the vast majority of Ontario's French visitors come to the province through Quebec), while overnight pleasure visitors from Germany had the highest incidence of visitation of Ontario's northern travel regions.

Sunset Country had the highest proportion of overnight pleasure visitors from outside Ontario (85.3%), mainly because of the visitors from the U.S. and Manitoba. Metro Toronto had the second highest proportion of overnight pleasure visitors from outside Ontario (68.5%) primarily due to the U.S. and overseas countries, but also due to visitors from Canadian provinces other than Ontario. Finally, Algoma had the third highest proportion of overnight pleasure visitors from outside Ontario (65.2%), mainly due to visitors from the United States.

TABLE 13: Overnight Pleasure Visitors in Ontario by Overnight Region of Visit and Origin, 1999

Region Visited	Percent of Overnight Pleasure Visitors, by Origin, Visiting each Ontario Travel Region*								
	Canada	Ontario	USA	Border States	Overseas	UK	France	Germany	Japan
Southwestern Ontario	8.0%	8.3%	16.9%	19.9%	4.6%	4.5%	--	10.5%	--
Festival Country	11.4%	15.0%	35.7%	33.8%	54.4%	61.0%	56.7%	61.8%	60.2%
Lakelands	25.1%	14.9%	4.4%	4.5%	9.8%	18.6%	3.1%	19.7%	0.8%
Metro Toronto	9.0%	14.7%	22.9%	22.0%	77.2%	79.1%	85.6%	85.5%	55.1%
Getaway Country	16.9%	16.8%	4.4%	3.7%	7.9%	10.7%	3.1%	5.3%	1.7%
Ontario East	15.2%	14.6%	13.3%	12.1%	31.9%	24.9%	78.4%	42.1%	8.5%
Near North	3.4%	3.6%	1.7%	1.3%	3.4%	4.5%	--	13.2%	--
Rainbow Country	6.6%	7.1%	2.1%	2.0%	1.6%	2.3%	--	3.9%	--
Algoma Country	1.6%	1.6%	7.6%	7.3%	1.7%	2.8%	1.0%	1.3%	2.5%
James Bay Frontier	1.7%	1.7%	0.6%	0.6%	0.4%	--	--	2.6%	--
North of Superior	2.2%	2.1%	4.3%	3.3%	1.1%	0.6%	--	1.3%	2.5%
Sunset Country	2.5%	0.8%	7.8%	7.4%	0.5%	--	1.0%	2.6%	--

* The percentages are based on the total number of visitors with a known regional destination in Ontario.
Note: The sum of each column is greater than 100% because visitors visit multiple locations in a given trip

Overnight pleasure visitors from overseas countries moved around the province much more than overnight pleasure visitors from other origins, visiting on average 1.69 Ontario travel regions. American overnight pleasure visitors visited, on average, 1.14 travel regions and Canadians 1.03 travel regions. These observations seem to validate the data presented earlier on activities which showed that overnight pleasure visitors from overseas countries had the highest incidence of participation in sightseeing (90.6%), followed by Americans.

Over half of Ontario's travel regions depend to a large extend on their own residents to supply them with the largest proportion of overnight pleasure visitors, while overseas countries play somewhat of a role only in Metro Toronto. Table 13 suggests that the vast majority of Ontario's travel regions cannot depend on the overseas countries to supply them with overnight pleasure visitors. If in a given year these regions do not perform well in the domestic and/or the U.S. overnight pleasure markets, then their tourism industry will perform poorly irrespective of how well they perform in the overseas markets.

Metro Toronto was the most diversified Ontario travel region in that its top four overnight pleasure markets accounted only for 31.5% of the region's total overnight pleasure visitors. For all other travel regions, with the exception of Festival Country, the top four markets accounted for over half of their overnight pleasure visitors, with James Bay Frontier being the region most heavily dependent on a single market (its own residents accounted for 45.6% of its overnight pleasure visitors).

TABLE 14: The Top Overnight Pleasure Markets for each Ontario Travel Region, 1999

Region Visited	% of a Region's Overnight Pleasure Visitors Coming from (Origin):	
Southwestern Ontario	Southwestern (458,000)	26.1%
	Michigan (424,000)	24.1%
	Festival Country (179,000)	10.2%
	Metro Toronto (170,000)	9.7%
Festival Country	Festival Country (426,000)	12.9%
	New York (414,000)	12.6%
	Metro Toronto (280,000)	8.5%
	Getaway Country (259,000)	7.9%
Lakelands	Metro Toronto (1,057,000)	30.8%
	Festival Country (814,000)	23.7%
	Getaway Country (564,000)	16.4%
	Lakelands (324,000)	9.4%
Metro Toronto	New York (245,000)	9.1%
	Ontario East (227,000)	8.4%
	Michigan (216,000)	8.0%
	Southwestern (206,000)	7.6%
	UK (133,000)	4.9%
Getaway Country	Getaway Country (1,039,000)	44.0%
	Metro Toronto (419,000)	17.7%
	Festival Country (299,000)	12.7%
	Ontario East (156,000)	6.6%
Ontario East	Ontario East (1,007,000)	36.6%
	New York (209,000)	7.6%
	Getaway Country (207,000)	7.5%
	Festival Country (197,000)	7.2%
Near North	Getaway Country (109,000)	21.0%
	Metro Toronto (66,000)	12.7%
	Festival Country (63,000)	12.2%
	Lakelands (37,000)	7.1%
	Rainbow Country (37,000)	7.1%
Rainbow Country	Metro Toronto (182000)	19.4%
	Rainbow Country (179,000)	19.1%
	Festival Country (161,000)	17.1%
	Getaway Country (79,000)	8.4%
Algoma Country	Michigan (93,000)	17.5%
	Algoma Country (54,000)	10.2%
	Ohio (37,000)	7.0%
	Wisconsin (36,000)	6.8%
James Bay Frontier	James Bay Frontier (110,000)	45.6%
	Rainbow Country (18,000)	7.5%
	Lakelands (17,000)	7.1%
	Festival Country (16,000)	6.6%
	New York (16,000)	6.6%
North of Superior	North of Superior (164,000)	35.0%
	Minnesota (47,000)	10.0%
	Wisconsin (34,000)	7.3%
	Ontario East (17,000)	3.6%
Sunset Country	Manitoba (221,000)	33.4%
	Minnesota (111,000)	16.8%
	Wisconsin (65,000)	9.8%
	Illinois (45,000)	6.8%

The average length of stay of overnight pleasure visitors in Ontario's travel regions ranged from a low of 2.28 nights in Festival Country to a high of 4.68 nights in Sunset Country. With the exception of North of Superior, Ontario's northern regions experienced longer lengths of stay than its southern regions – a reflection, in part, of their remoteness, the difficulty of getting there and the relatively higher transportation costs.

HOW MUCH DID THEY SPEND IN ONTARIO?

The expenditures of pleasure visitors accounted for 42.9% of the total spending in Ontario by all visitors, while the spending of the overnight pleasure visitors accounted for 41.8% of the total expenditures of all overnight visitors in the province.

Overall, pleasure visitors had an average spending per person visit of $124, as compared to an average of $123 of the general visitor population. Overnight pleasure visitors had an average spending per person visit of $222, while the general overnight visitor of Ontario had a slightly higher average of $239 per person visit.

Ontario residents had the lowest average spending per overnight pleasure visit ($128), as well as per overnight party visit ($247) and per overnight party per night ($90).

Overnight pleasure visitors from the U.S. had an average spending per person visit that was over two and a half times higher than that of Ontarians' ($339), while overseas overnight pleasure visitors had an average per person visit spending that was almost three and a half times higher than that of Ontarians' ($858), partly because of high transportation costs to reach Ontario.

Overnight pleasure visitors from the UK had the highest average spending per person visit as well as per party visit, while Japanese overnight pleasure visitors had the highest average spending per party per night.

TABLE 15: Total Spending Assigned to Ontario, 1999				
Visitors' Length of Stay	All Visitors (000)	Share (%)	Pleasure Visitors (000)	Share (%)
Same Day	$3,518,551	26.9	$1,605,147	28.7
Overnight	$9,541,396	73.1	$3,991,723	71.3
Total	$13,059,947	100.0	$5,596,870	100.0

Although the overnight pleasure visitors from Japan had the highest average spending on a daily basis, given that they did not stay long in Ontario (2.42 nights as compared to 8.46 nights for German and 8.04 for UK overnight pleasure visitors), their average spending per party visit or person visit was low when compared to that of the UK or the German overnight pleasure visitors.

Overnight pleasure visitors from the UK had the highest average spending per person or per party visit because they also stayed the longest in the province (after the Germans).

When the transportation costs are removed from the overnight pleasure visitors spending, the ranking of the high yield markets changes somewhat. Although Japanese overnight pleasure visitors continue to have the highest average spending per party per night, it is now the US border states that have the second highest average spending per party per night, followed by the overnight pleasure visitors from the UK (see Table 18).

TABLE 16: Overnight Pleasure Visitors, 1999 Average Expenditures in Ontario			
Origin of Visitors	Average per Person	Average per Party	Average per Party Night
Total Canada	$135	$261	$92
Ontario	$128	$247	$90
Total USA	$339	$858	$262
USA Border States	$305	$785	$266
Total Overseas	$914	$2,035	$271
UK	$1,256	$2,678	$329
France	$656	$1,383	$320
Germany	$1,042	$2,329	$286
Japan	$632	$1,622	$602

Table 16 demonstrates that, when all expenditures are taken into account, the overnight pleasure visitors from the UK constitute Ontario's highest yield market, followed by Germans and Japanese. However, as was the case with the various activity groups and the number of nights they generated, one needs to look at the expenditures shares of each of these visitor groups to determine their value to the provincial economy and not just their average spending per party visit. This is done in Table 17.

According to this table, although the UK, Japan and Germany maintained their importance within the overseas group, it was the Ontario residents that contributed by far the most to the total spending of overnight pleasure visitors in the province, accounting for 37.6% of this spending. Ontario was followed by Michigan, New York, UK, Ohio and Pennsylvania. Japan and Germany ranked almost at the bottom of list presented in Table 17, behind Quebec and Illinois.

Table 18 demonstrates, that the further away an overnight pleasure visitor's place of residence was from Ontario, the higher the share of transportation expenditures and the lower the share of the items purchased locally while in the province. Accommodation accounted for the highest share of the overnight pleasure visitors' non-transport related spending in Ontario (38.1%), followed by food/beverage (34.1%).

Among all origin groups, overnight pleasure visitors from the U.S., and especially those from Ontario's Border States, had the highest share of their non-transport related expenditures going to accommodation, partly because this group of visitors had the highest incidence of commercial roofed accommodation usage (overnight pleasure visitors from the U.S. spent 60.3% of their nights in Ontario in commercial roofed accommodation, as compared to 38.5% for overnight pleasure visitors from overseas countries and 22.2% for Canadians).

TABLE 17: Overnight Pleasure Visitors Total Spending by Origin, 1999		
Origin of Visitors	Total Spending (000)	Share (%)
Total Canada	$1,716,165	43.0%
Ontario	$1,502,679	37.6%
Quebec	$85,629	2.1%
Total USA	$1,512,386	37.9%
USA Border States	$1,028,072	25.8%
Michigan	$269,383	6.7%
New York	$225,498	5.6%
Ohio	$160,540	4.0%
Pennsylvania	$110,630	2.8%
Wisconsin	$90,282	2.3%
Illinois	$102,356	2.6%
Minnesota	$69,383	1.7%
California	$57,527	1.4%
New Jersey	$37,214	0.9%
Total Overseas	$763,172	19.1%
UK	$222,268	5.6%
France	$63,601	1.6%
Germany	$79,195	2.0%
Japan	$74,627	1.9%

Overnight pleasure visitors from overseas countries had the highest share of their non-transport expenditures going to retail shopping and the lowest share among all origin groups going to recreation or entertainment. Again these observation imply that the overnight pleasure visitors from overseas countries come to Ontario to see the region (sightseeing) and to shop, but not to attend recreational attractions. Finally, Canadians and Ontarians had the highest share of their non-transport expenditures in Ontario going to food/beverage.

Overnight pleasure visitors from Germany had the highest average spending on accommodation and food/beverage, while visitors from the U.K. had the highest average spending on recreation and retail, per person visit, as well as per party visit. However, on a per party-night basis, overnight pleasure visitors from Japan had the highest average spending on accommodation, food/beverage and retail, while overnight pleasure visitors from Ontario's Border States and from Japan had the highest average spending on recreation.

The above discussion seems to point out that in calculating the tourism benefits of a market segment to a particular tourism sector one needs to weigh the average spending per party of that market segment with the likelihood that these visitors will participate in that particular tourism sector (e.g., the incidence of utilisation of commercial roofed accommodation) and the likelihood, or effort that is required to attract a visitor from that particular market segment. For example, the marketing effort required to convince a Japanese visitor to take an overnight pleasure trip to Ontario is probably much higher than the effort required to convince an American residing in one of Ontario's Border States to visit the province.

TABLE 18: How Overnight Pleasure Visitors Spent their Non-transport Budget in Ontario by Origin, 1999

Item of Expenditure	Origin of Overnight Pleasure Visitors							
	Canada	Ontario	USA	USA Border States	Over-seas	UK	Ger-many	Japan
Spending by overnight pleasure visitors, excluding transport related expenditures (millions)	$1,326	$1,151	$1,321	$925	$472	$133	$50	$45
% of total spending in Ontario by overnight pleasure visitors	77.2	76.6	87.3	90.0	61.9	60.0	63.5	60.3
Average Spending								
Per person	$105	$98	$296	$275	$566	$753	$661	$382
Per party	$201	$189	$749	$706	$1,260	$1,606	$1,478	$979
Per party night	$71	$69	$229	$240	$168	$197	$181	$363
Accommodation (millions)	$497	$439	$546	$378	$166	$50	$18	$19
As a % of non-transport spending by overnight pleasure	37.5	38.1	41.4	40.9	35.2	37.4	35.8	41.1
Average Spending								
Per person	$39	$37	$122	$112	$199	$178	$236	$157
Per party	$75	$72	$310	$289	$443	$380	$529	$402
Per party night	$27	$26	$95	$98	$59	$47	$65	$149
Food/Beverage (millions)	$461	$393	$316	$220	$113	$32	$14	$9
As a % of non-transport spending by overnight pleasure	34.8	34.1	23.9	23.8	23.9	23.7	28.0	19.4
Average Spending								
Per person	$36	$33	$71	$65	$135	$178	$185	$74
Per party	$70	$64	$179	$168	$301	$380	$415	$190
Per party night	$25	$24	$55	$57	$40	$47	$51	$71
Recreation/Entertainment (millions)	$188	$163	$250	$185	$64	$20	$6	$6
As a % of non-transport spending by overnight pleasure	14.2	14.2	19.0	20.0	13.6	14.7	11.8	13.1
Average Spending								
Per person	$15	$14	$56	$55	$77	$110	$78	$50
Per party	$29	$27	$142	$141	$172	$235	$175	$128
Per party night	$10	$10	$43	$48	$23	$29	$21	$96
Retail (millions)	$180	$156	$208	$142	$129	$32	$12	$12
As a % of non-transport spending by overnight pleasure	13.6	13.6	15.7	15.4	27.3	24.3	24.4	26.4
Average Spending								
Per person	$15	$13	$47	$42	$154	$183	$161	$101
Per party	$27	$26	$118	$109	$344	$390	$360	$259
Per party night	$10	$9	$36	$37	$46	$48	$44	$96

HOW DID ONTARIO'S INTERNATIONAL VISITORS EVALUATE VARIOUS ASPECTS OF THEIR TRIP?

International visitors were asked to rate various aspects of their stay in Ontario relative to their home country. The majority of the American visitors who were on an overnight pleasure trip to Ontario rated transportation services, accommodation services, hospitality of local people and the variety of things to see and do as essentially the same in Ontario as in the United States.

TABLE 19: Overnight Pleasure Visitors in Ontario
"In comparison with your home country, how would you rate the following aspects of your trip in Canada?"

Origin of Visitors	Services Being Evaluated				
	Transport Services	Accom-modation Services	Hospitality of Local People	Value for Money	Variety of Things to See & Do
USA					
Better	21.0%	13.1%	40.5%	54.2%	24.1%
Same	67.7%	77.4%	54.8%	31.1%	69.9%
Not as good	11.3%	9.5%	4.7%	14.6%	6.1%
Border States					
Better	21.0%	13.9%	40.2%	54.1%	26.5%
Same	67.9%	76.9%	56.0%	31.3%	66.7%
Not as good	11.1%	9.2%	3.8%	14.6%	6.7%
Overseas					
Better	43.4%	39.8%	56.7%	49.7%	47.1%
Same	40.2%	53.3%	39.2%	32.0%	43.2%
Not as good	16.3%	6.9%	4.1%	18.3%	9.7%
UK					
Better	52.0%	48.9%	64.3%	83.4%	42.4%
Same	39.4%	48.8%	33.6%	15.2%	49.9%
Not as good	8.6%	2.3%	2.2%	1.4%	7.7%
France					
Better	17.3%	25.7%	83.6%	31.8%	21.4%
Same	69.7%	68.7%	15.7%	53.8%	61.9%
Not as good	12.9%	5.6%	0.7%	14.5%	16.8%
Germany					
Better	16.5%	34.4%	73.1%	35.1%	40.0%
Same	54.1%	62.2%	25.8%	45.6%	57.1%
Not as good	29.4%	3.5%	1.1%	19.3%	2.6%
Japan					
Better	28.8%	23.5%	44.6%	54.6%	55.0%
Same	38.4%	57.2%	53.5%	26.0%	30.0%
Not as good	32.8%	19.3%	1.9%	19.4%	15.0%

Given the low value of the Canadian dollar during 1999, the majority of American overnight pleasure visitors also rated "value for money" as being better in Ontario than back home. Although "value for money" was the only item that was ranked by Americans as being better in Ontario than in the U.S., it also had the highest negative rating (14.6%), while the hospitality of local people received the lowest negative rating from overnight pleasure visitors from the United States.

The majority of the overnight pleasure visitors from overseas countries rated the "hospitality of local people" as better in Ontario as back home. For the remaining services, overseas visitors were divided between those ranking them as better in Ontario and those ranking them as the same. Overall, overseas visitors had a higher negative rating of transportation services than Americans, with Japanese visitors having one of the highest negative ratings of this service (32.8%).

With respect to Ontario's primary overseas markets, overnight pleasure visitors from the UK gave Ontario high ratings for "transportation", "the hospitality of its people" and "value for money", German and French visitors gave the province high ratings for "the hospitality of its people" and Japanese visitors for "value for money" and "variety of things to see and do".

OVERNIGHT PLEASURE VISITORS VS.OVERNIGHT VISITORS WHOSE PRIMARY TRIP PURPOSE WAS TO VISIT FRIENDS OR RELATIVES

TABLE 20: Overnight Visitors in Ontario, 1998

	Pleasure	VFR
PERCENT OF VISITORS COMING TO ONTARIO FROM:		
Canada	70.5	87.4
Ontario –	65.5	78.4
Quebec	2.3	4.8
USA	24.8	8.7
Michigan	5.6	2.3
New York	4.9	1.9
Ohio	2.8	0.5
Overseas	4.6	3.9
UK	1.0	1.0
France	0.5	0.2
Germany	0.4	0.2
Japan	0.7	0.1
PERCENT OF TRAVELLING PARTIES COMPRISED OF:		
Adults only	77.9	84.9
One adult	37.0	61.9
Two adults	34.4	21.4
Three or more adults	5.9	1.6
Adults and children under 15	19.1	14.2
LENGTH OF STAY IN ONTARIO:		
Percent of visitors staying for 1-3 nights	76.6	80.0
Average length of stay (nights)	3.23	3.10
PERCENT OF VISITORS PARTICIPATING IN SELECTED ACTIVITIES:		
Participate in Outdoor/Sports	55.4	24.2
Sightseeing	46.2	16.6
Shopping	39.9	30.8
Visit Friends or Relatives	35.1	98.9
Visit Parks/Historic Sites	22.5	6.3
Attend Cultural Events	19.0	7.9
Nightlife/Entertainment	13.4	8.9
Attend Sports Events	7.3	3.4
Attend Festival or Fairs	7.0	4.4
Visit Theme Park	5.0	2.0
PERCENT OF VISITORS BY TYPES OF ACCOMMODATION:		
Roofed Commercial	41.6	8.5
Hotel	23.5	4.6
Camping/Trailer Park	16.5	1.4
Non-Commercial	39.4	91.7
PERCENT OF VISITORS IN ONTARIO BY SEASON:		
Quarter I	11.1	19.6
Quarter II	24.7	26.6
Quarter III	52.0	30.8
Quarter IV	12.2	23.0
AVERAGE SPENDING IN ONTARIO:		
Per Person	$222	$131
Per Party	$458	$207
Per Party Night	$147	$68
PERCENT OF TOTAL OVERNIGHT SPENDING ACCOUNTED FOR BY:	41.8	20.5

As expected, a higher proportion of overnight visitors whose primary trip purpose was to visit friends or relatives (VFR) originated in Canada than overnight pleasure visitors (87.4% vs. 70.5%) and a much lower proportion originated in the US (8.7% vs. 24.8%). However, the proportion of overnight VFR and pleasure visitors that originated in overseas countries was very similar (3.9% vs. 4.6%).

Overnight VFR visitors travelled in Ontario in adult groups, especially as single adults, while overnight pleasure visitors had a higher incidence of travel with children under 15 (19.1% vs. 14.2%).

A higher proportion of overnight VFR visitors (80.0% vs. 76.6%) took trips in Ontario of a short duration (1-3 nights), on average overnight VFR visitors did not stay in Ontario as long as overnight pleasure visitors (3.10 nights vs. 3.23 nights).

Overnight pleasure visitors were much more active than overnight VFR visitors having a much higher incidence of participation in every activity, except visiting friends and relatives.

Overall, overnight pleasure visitors had an outdoors orientation, while VFR visitors had a shopping and VFR orientation, or a more urban orientation.

As expected a much higher proportion of overnight VFR visitors used non-commercial accommodation (91.7% vs. 39.4%), with only 1.4% of them using campgrounds/trailer parks for accommodation (as compared to 16.5% for overnight pleasure visitors).

While the majority of the overnight pleasure visitors travelled in Ontario during the third calendar quarter (52.0%), the overnight VFR visitors were much more evenly spread throughout the year (3rd quarter accounting only for 30.8% of them). As such, programs promoting the hosting of friends and relatives

may significantly contribute to an extension of tourism into the shoulder seasons.

As a result of the lower utilization of commercial accommodation and their smaller size, VFR visitors accounted only for 20.5% of the total spending in Ontario by overnight visitors, while pleasure visitors accounted for 41.8%. Overnight pleasure visitors had an average spending per party-night that was over two times larger than that of overnight VFR visitors ($147 vs. $68) and an average spending per party visit that was double that of overnight VFR visitors.

- Ontario's Overnight Pleasure Travel Market –1996, 1998 & 1999

Overnight pleasure visits in Ontario increased by 5.6% between 1996 and 1998, and by 0.7% between 1998 and 1999. Compared to 1996, the number of overnight pleasure visitors in Ontario in 1999 increased by 6.3%.

In 1996, overnight pleasure visitors accounted for 44.7% of all overnight visitors in Ontario. This share increased in 1998 by 1.3% to 45.3%, and decreased in 1999 by 0.4% to 45.1% of total overnight visitors.

TABLE 21: Overnight Person Visits in Ontario*

Year	Overnight Pleasure Visitors (000's)	Rate of Change	Share of Total Overnight visitors	All Overnight Visitors (000's)	Rate of Change
1996	16,912	-	44.7%	37,841	-
1998	17,855	5.6%	45.3%	39,395	4.1%
1999	17,977	0.7%	45.1%	39,842	1.1%

*Only domestic visitors with an Ontario destination are included in this table and not all overnight visitors to Ontario from domestic origins.

As the table below demonstrates, overnight pleasure visitors from overseas countries were responsible for the decline of overnight pleasure visitors' share. Compared to 1996, in 1999 the number of overnight pleasure visitors from Overseas declined by 25.0%, while the number of pleasure visitors from all other origins increased.

TABLE 22: Overnight Pleasure Visitors in Ontario, by Origin

Year	Origin of Visitors								
	Total	Other Canada	Share	Ontario	Share	USA	Share	Overseas	Share
1996	16,912	786	4.6%	11,119	65.7%	3,893	23.0%	1,114	6.6%
1998	17,855	954	5.3%	11,478	64.3%	4,573	25.6%	850	4.8%
1999	17,977	897	5.0%	11,781	65.5%	4,464	24.8%	835	4.6%

As a result of the differential growth rates of pleasure visitors from different origins, the share of overnight pleasure visitors from the U.S. increased between 1996 and 1999 from 23.0% to 24.8%, while that of Ontarians' and overseas countries declined.

All regions with the exception of Metro Toronto and Getaway Country experienced increases in overnight pleasure visitors between 1996 and 1999, with Festival Country experiencing the largest increase (32.5%). Ontario North also experienced a large increase in overnight pleasure visitors with a growth of 28.5% between 1996 and 1999.

As a result of these differential growth rates, Metro Toronto's share of overnight pleasure visitors declined in 1999 over 1996 by 10.3% from 16.7% to 15.0%. Getaway Country's share also declined by 10.1% from

14.6% of overnight pleasure visitors in 1996 to 13.1% in 1999. Ontario East's share declined (while the actual number of overnight business visitors to the region increased) by 3.9% in 1999 over 1996 from 15.9% to 15.3%. While Festival Country experienced the largest growth in actual numbers of overnight pleasure visitors, Lakelands continues to attract the largest portion of overnight pleasure visitors in Ontario (19.1% in 1999).

TABLE 23: Overnight Pleasure Visitors in Ontario, by Region Visited

Year	Region Visited						
	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6	Regions 7-12
1996	1,536	2488	3221	2,823	2471	2,689	2613
1998	1,738	3634	3477	2,532	2026	2,512	3382
1999	1,756	3297	3432	2,693	2361	2,748	3359

- Glossary -

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

Other accommodation is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to OMTOUR rules.

EXPENDITURES IN ONTARIO BY TRIP CHARACTERISTICS. Ontario expenditures reported for trips with specific characteristics such as activity, are the *dollars* assigned to Ontario by Statistics Canada for trips with the specified characteristic. They do not represent expenditures on the service or activity. For example, the average expenditures associated with trips that included visiting a theme park refer to *average* spending in Ontario on the entire trip. It does not refer to spending *while visiting theme parks*.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention.* In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention.*

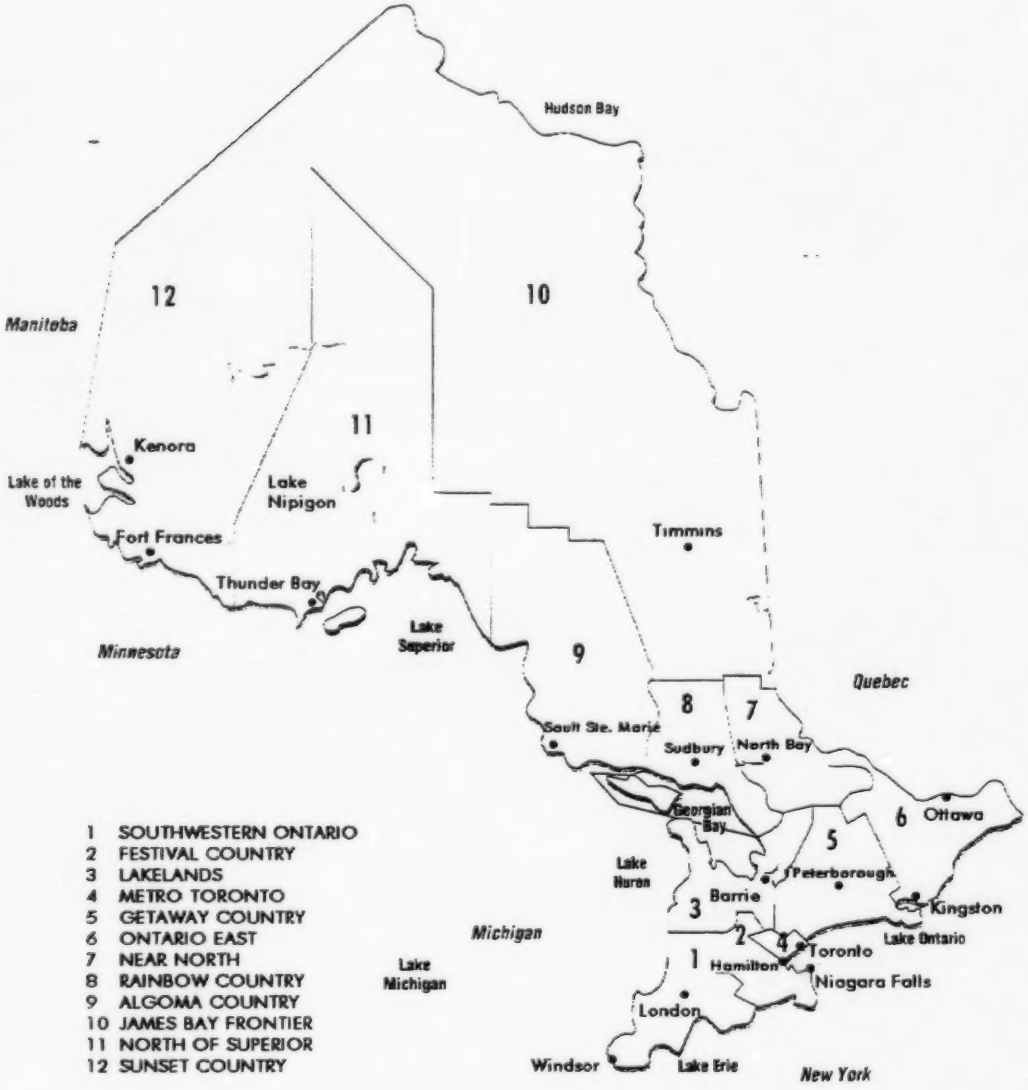
QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS A respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

- Map of Ontario's Travel Regions* -



* As of 2001, the Ministry has identified new regions for research.